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TRAVEL PRINTOUT

Supported by a grant from Travel Industry Association of America

U.S. Travel Data Center

Research News for the U.S. Travel Industry

January 1986 Volume 15, Number 1

STATE TRAVEL DEVELOPMENT BUDGETS RISE 13 PERCENT IN 1985-86

State travel offices in 50 states plan to spend $216 million for travel and tourism development in 1985-86, according to the 1985-86 Survey of State Travel Offices, released by the US Travel Data Center.

The survey reports tourism development budgets for the 50 states increased 13 percent over 1984-85, a more moderate rise than last year's 23 percent (the result of unprecedented increases in the travel development budgets of California and Illinois for 1984-85).

Illinois will have the largest budget for the second consecutive year, allocating $15,500,000 this year for travel development, followed by Michigan, with almost $12 million.

STATES HAVING LARGEST TRAVEL PROMOTION BUDGETS

Rank 1985-86		Budget	% Change from 1984-85
1.	Illinois	$15,500,000	7.6
2.	Michigan	11,800,000	30.0
3.	Tennessee	10,645,900	51.6
4.	New York	10,600,000	10.8
5.	Florida	9,498,292	2.6
6.	Pennsylvania	9,470,000	20.5
7.	Massachusetts	9,291,564	-2.6
8.	Alaska	8,274,000	10.6
9.	Hawaii	6,564,391	17.1
10.	New Jersey	6,051,000	9.0

Forty-one states posted budget increases for the current year. The average state travel development budget is $4,312,659, which breaks last year's record high of $3,787,854.

Eight states plan to spend less than last year on travel development, compared with eleven in 1984-85. Nevada posted the greatest cutback, decreasing spending by almost 11 percent, followed by Alaska with a 10.6 percent decline.

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PROGRAM ADVISORY COUNCIL REVIEWS DATA CENTER'S 1986 RESEARCH PROGRAM

The US Travel Data Center's Program Advisory Council, at its recent annual meeting in New York, rated the Data Center's National Travel Survey and annual Travel Outlook Forum as the projects most useful to the travel industry.

The council, comprised of representatives from each organization maintaining a full membership in the Data Center, meets annually to review the research program and recommend projects for the coming year. The 1985 council gave the National Travel Survey an average rating of 4.78 out of 5.00, reaffirming that the ongoing monthly telephone survey of 1,500 U.S. adults provides valuable data on American travel markets. Members also showed considerable interest in adding other sections to the quarterly and annual survey reports, such as increased coverage of hotel/motel users and more regional breakdowns in the data.

The Travel Outlook Forum, a symposium which concluded its eleventh year in 1985, received a 4.50 rating.

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TRAVEL PRICES FALL IN NOVEMBER

Lower lodging prices caused travel costs in the U.S. to drop 0.1 percent in November, the second month in 1985 to register a decline, according to the US Travel Data Center's Travel Price Index (TPI).

For comparison, the cost of consumer goods as measured by the Consumer Price Index (CPI) rose 0.3 percent in November.

The TPI, which measures changes in the seasonally unadjusted cost of lodging, food, transportation and other goods and services purchased by Americans traveling away from home in this country, fell to 388.6 in November (1967=100).

Lodging prices fell 1.4 percent in November, the second decline in three months. Intercity train fares were 0.4 percent lower than in the previous month.

On the other hand, taxicab fares rose 0.8 percent in November. Airline fares, gasoline prices, and the costs of entertainment services gained 0.5 percent. Intercity bus fares advanced 0.4 percent over the previous month, but the cost of incidentals remained unchanged.

The TPI has increased 5.7 percent over the past twelve months, compared to a 3.6 percent rise in the CPI. Despite recent declines, lodging prices have grown 8.9 percent since November 1984.##

Monthly and Annual Rates of Change in the Travel Price Index and Components, November 1985

TPI Component	Monthly Percent Change October 1985 to November 1985	Annual Percent Change November 1984 to November 1985
Transportation	0.5	4.6
Airline Fares	0.5	6.8
Intercity Bus Fares	0.4	7.4
Intercity Train Fares	- 0.4	2.5
Taxicab Fares	0.8	3.6
Gasoline	0.5	1.9
Lodging	- 1.4	8.9
Food Away From Home	0.3	4.0
Entertainment Services	0.5	6.7
Incidentals	0.0	3.0
TRAVEL PRICE INDEX	- 0.1	5.7
CONSUMER PRICE INDEX	0.3	3.6

Source: US Travel Data Center and U.S. Bureau of Labor Statistics

TRAVEL PRINTOUT is published monthly by the U.S. Travel Data Center, the national non-profit center for travel and tourism research. 1899 L Street, N.W., Washington, DC 20036. Telephone number: (202) 293-1040. Dr. Douglas C. Frechtling, Director. Ida Simmons, Editor. ISSN: 0744-6233.

TRAVEL PRINTOUT reports on the results of Data Center projects, national travel research conducted by other respected organizations, and trends in the U.S. travel industry. Subscriptions are available for $49 per year, U.S., Canada and Mexico; other foreign countries, $59 per year, payable in U.S. funds only.

PUBLICATION SALES

Increased publications activity at the US Travel Data Center during 1985 has included sales of over 1400 publications to individuals, state and local governments, libraries and corporations in 48 states, the District of Columbia and 11 foreign countries.

In addition, the Data Center regularly sends its publications to 300 individuals as a benefit of their Data Center membership.

More than 1900 people receive Travel Printout each month, including subscribers, Data Center members and members of the Travel Industry Association of America.

For a complete list of the Data Center's publications and information about membership, write the US Travel Data Center, 1899 L Street NW, Suite 610, Washington, DC 20036, or call 202/293-1040. **

DATA CENTER RELEASES 1986 GUIDE, FREE UPON REQUEST

A free 1986 Guide to Programs, Membership and Publications is available upon request from the Data Center and will be sent to all full and limited members in February. The 30-page guide details the Data Center's 1986 research program and describes past and current publications and membership benefits.

Among the reports which the Data Center will publish in 1986, the guide lists the 1985-86 Outlook for Travel and Tourism, TravelTab 1986 (a quick reference guide to current travel trends), and quarterly and annual reports from the 1985 and 1986 National Travel Surveys, the continuing survey of travel activity by U.S. residents now in its eighth year.

Address requests to the US Travel Data Center, 1899 L Street NW, Washington, DC 20036. **

TERRORISM REPORT

The impact of terrorism on travel activity will be the subject of a US Travel Data Center report to be released in early April.

The report will contain the results of special questions added in July 1985 and February 1986 to the National Travel Survey, a monthly telephone survey conducted by the Data Center since 1979.

The report will compare the number of reservations, cancellations and changes in destinations made by US travelers after the TWA hijacking last June with those made since the Rome and Vienna airport attacks.

In July 1985, the survey found 6.5 million Americans had made reservations abroad. After the TWA hijacking, 1.4 million changed their reservations: 850,000 cancelled outright; 150,000 changed to another foreign destination; and 220,000 chose a domestic destination.

"We can conduct this special study because the National Travel Survey is extremely timely and flexible," said Suzanne D. Cook, assistant director of the Data Center, who has directed the survey since its begining. "Anyone can add new questions to the survey in as little as a few days and receive the results in less than six weeks."

For further information about adding custom-designed questions to the National Travel Survey, contact Suzanne Cook, US Travel Data Center, 1899 L Street NW, Suite 610, Washington, DC 20036, or phone 202/293-1040. **

1985 was the the first growth year for American travel away from home since 1982, according to Data Center Director Douglas Frechtling's article entitled "Travel Services" recently published in U.S. Industrial Outlook 1986. The report is available for $21 from Government Printing Office, Documents Department, Washington, DC 20402.**

PROGRAM ADVISORY COUNCIL (CONTINUED)

Council members who had attended the 1985-86 forum, held last September in New Orleans, applauded the addition of market segments to the program but indicated that the forum should continue to include the outlook for various industry sectors. Opinions about whether the forum should be held in September or December remained divided; some averred that the earlier date provides information needed for budgeting purposes, while others countered that December provides more authoritative information and receives better press coverage.

The Program Advisory Council evaluated other research projects proposed for the coming year:

- The 1985-86 Economic Review of Travel in America, which would be the sixth annual edition in the series, received a 4.46 average rating. Council members suggested that the report include a section on the economic return that states receive on their investment in advertising.
- The 1985 Economic Impact of Foreign Visitor Spending in the U.S., rated at 4.32, would provide estimates of the direct impact of such expenditures on the U.S. economy, and would be the second annual study of foreign visitor spending. Council members felt that these estimates could be useful to the few states which receive substantial numbers of foreign visitors.
- The 1984-85 National Travel Expenditure Study, which would provide estimates of travel spending per trip, person-trip and person-day, was rated at 4.14. As in earlier years, there was significant interest in this project; however, the council made no recommendations on how this expensive program might be funded.
- Travel Printout, the Data Center's monthly newsletter, received a rating of 4.11. Council members agreed that this publication, which reports on the results of Data Center projects, travel research conducted by other national organizations and data on monthly trends in the travel industry, is useful to the industry. The council requested states to send a copy of their latest studies to the Data Center and that Travel Printout coverage be extended to include these studies.

The 1986 Guide to Membership, Publications and Programs, to be released in January, will announce the Data Center's full 1986 research program. For a free copy of the guide, write the US Travel Data Center, 1899 L Street NW, Suite 610, Washington, DC 20036. ##

SURVEY OF STATE TRAVEL OFFICES (CONTINUED)

The survey reports a 12 percent increase from the prior year's advertising budget allocations, compared with a 37 percent increase the previous year. The average state will devote to advertising 40 percent of its total travel development budget, over $1.7 million, the same proportion as last year.

"States continue to recognize that tourism plays an essential role in economic development," commented Dr. Douglas C. Frechtling, director of the Data Center. "This year's strong rise in state travel development budgets bodes well for future regional economic growth."

The 1985-86 Survey of State Travel Offices is the thirteenth annual report on the budgets, advertising and programs of the state and U.S. territory tourism development agencies. The 100-page report will be sent to members and is available to others for $60.00 prepaid from the US Travel Data Center, 1899 L Street NW, Suite 610, Washington, DC 20036.

This study was supported by a grant from the Travel Industry Association of America. ##

National Travel Survey

TRAVEL RISES SLIGHTLY IN SEPTEMBER 1985

Travel during September showed an increase of almost 1 percent over year-earlier levels, according to the US Travel Data Center's latest National Travel Survey results.

Following a slight decline in August, travel by Americans rose from 90.4 million person-trips in September 1984 to 91.2 million a year later. (A person-trip is measured each time anyone goes 100 miles or more away from home.)

The monthly telephone survey reported that vacation travel grew 5 percent. Business/convention travel increased 23 percent over the level set in September 1984, and weekend travel rose 20 percent. Travel for pleasure purposes such as visiting friends and relatives, sightseeing or other entertainment purposes, showed a 6 percent increase over 1984 levels, while travel for personal business fell below year-earlier levels.

The average trip duration rose to 5.3 nights from 4.5 nights one year earlier, while round-trip distance increased sharply to 940 miles, up from 770 miles in 1984.

Travel by personal motor vehicle fell 6 percent from September 1984, while air travel continued to increase, showing a 20 percent gain in person-trips.

The South Atlantic/East South Central region was the most popular with American travelers, accounting for 25 million person-trips during September 1985, although the West North Central/West South Central region showed the greatest increase in visitors. ##

Visitor Volume at National Parks

Region	OCT 1985 visits	Change from OCT 1984 (percent)	Percent change 1985/1984 Year to Date
NEW ENGLAND	1,267,398	-4.3	-1.3
MIDDLE ATLANTIC	1,962,188	3.0	5.1
SOUTH EAST	11,380,167	5.7	12.6
EAST NORTH CENTRAL	399,709	0.1	5.5
WEST NORTH CENTRAL	444,780	7.9	6.7
WEST SOUTH CENTRAL	619,627	3.2	-.0
MOUNTAIN	2,099,396	13.0	4.7
PACIFIC	3,470,373	3.8	1.0
TOTAL	21,643,638	5.0	7.1

States comprising the Census regions:

NEW ENGLAND: Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, Vermont. MIDDLE ATLANTIC: New Jersey, New York, Pennsylvania. SOUTH EAST: Alabama, Delaware, Florida, Georgia, Kentucky, Maryland, Mississippi, North Carolina, South Carolina, Tennessee, Virginia, West Virginia. EAST NORTH CENTRAL: Indiana, Illinois, Michigan, Ohio, Wisconsin. WEST NORTH CENTRAL: Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota, South Dakota. WEST SOUTH CENTRAL: Arkansas, Louisiana, Oklahoma, Texas. MOUNTAIN: Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, Wyoming. PACIFIC: Alaska, California, Hawaii, Oregon, Washington.

CURRENT TRAVEL INDICATORS

	Current Month	Current Value	Percent Change From Previous Month	Percent Change From Year-ago Month	Percent Change Year-to-date 1985/84
Establishment receipts or retail sales					
Hotels, motels and other lodging places(1)	Oct	$ 3,479 million	-1.5	6.1	N/A
Eating and drinking places(2)	Oct	$11,010 million	0.6	6.8	5.5
Gasoline service stations(2)	Oct	$ 8,537 million	0.1	1.9	1.4
Commercial lodging demand					
Hotel/motel occupancy rate(3)	Oct	63.2 percent	0.4	-3.0	-2.1
Real demand for commercial lodging(4)		N/A	N/A	N/A	N/A
Airline passenger traffic(5)					
Domestic revenue passenger miles	Oct	17.7 billion	8.2	4.7	9.5
International revenue passenger miles	Oct	5.2 billion	11.5	5.8	16.3
Highway traffic volume(6)					
Rural arterial vehicle miles	Oct	38.0 billion	0.9	3.8	3.6
Rail passenger traffic(7)					
Amtrak passenger miles	Oct	365.2 million	3.0	13.2	7.8
Travel Price Index(8)	Oct	389.0	0.5	5.4	4.7
U.S. resident travel(9)					
Total person-trips	Sep	91.2 million	-31.5	0.9	9.6
Vacation person trips	Sep	61.5 million	40.9	4.6	6.0
Total person nights	Sep	483.4 million	-45.2	18.8	11.5
Vacation person nights	Sep	338.3 million	-49.2	10.6	8.6
Public use of national parks(10)					
Visits	Oct	21,811,042	-19.3	6.1	9.8
Overnight stays	Oct	933,752	-44.1	5.8	-12.0
Foreign arrivals in U.S.(11)					
From overseas	Aug	990,636	0.2	1.0	0.6
From Canada	Oct	791,238	-18.7	0.4	-0.3
U.S. citizen departures(11)					
To overseas	Aug	1,508,094	9.3	8.8	8.0
To Canada	Oct	798,908	30.4	8.0	4.4
Domestic demand for motor gasoline(12)					
Barrels per day	Oct	6,914 thousand	4.1	2.7	3.6

N/A = not available

(1)Source: Smith Travel Research, seasonally unadjusted. (2)Preliminary, adjusted for seasonal variation and trading day differences. Source: Bureau of the Census. (3)Source: Laventhol and Horwath, seasonally adjusted. (4)Source: Laventhol and Horwath, unadjusted expenditures for commercial lodging adjusted for inflation since 1972. (5)Preliminary, U.S. scheduled service air carriers. Source: U.S. Department of Transportation. (6)Source: Federal Highway Administration. (7)Source: National Railroad Passenger Corporation (Amtrak). (8)Source: U.S. Travel Data Center and Bureau of Labor Statistics. (9)Source: U.S. Travel Data Center. (10)Preliminary; unadjusted for differences in reporting units. Source: National Park Service. (11)Source: Statistics Canada and Nettleton Travel Research Center. (12)Preliminary. Source: U.S. Department of Energy.

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U.S. POSTAGE PAID FIRST CLASS PERMIT NO. 8523 WASHINGTON, D.C.

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